VA LEARNING UNIVERSITY

VA TMS Domain Manager and Learning Manager Administrator Course

Session 2: Create and Configure Items and Curricula (Part 1 of 2)

Virtual Instructor-Led Training

Participant Guide

March 2014

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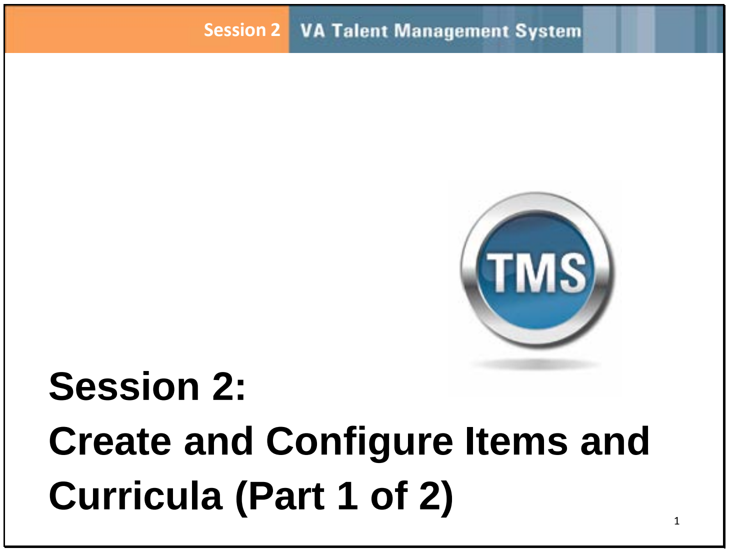
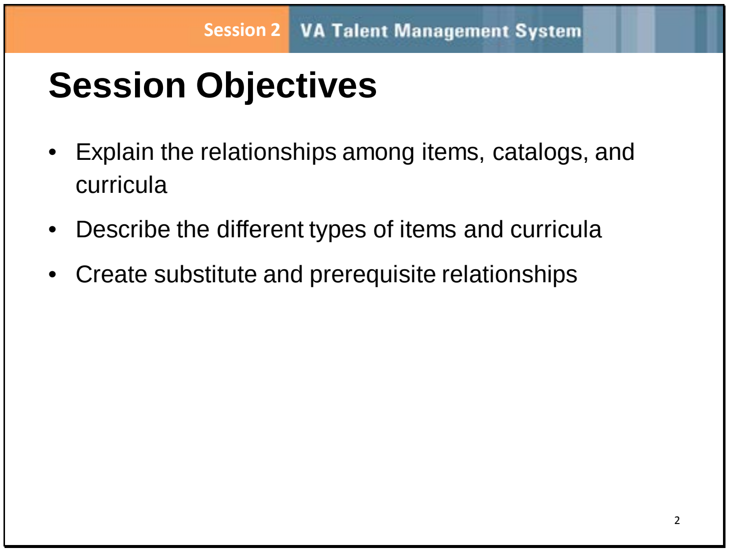
1.0 Training Content

1.1 *Session 2 Overview*



Slide 1: Session 2: Create and Configure Items and Curricula (Part 1 of 2)

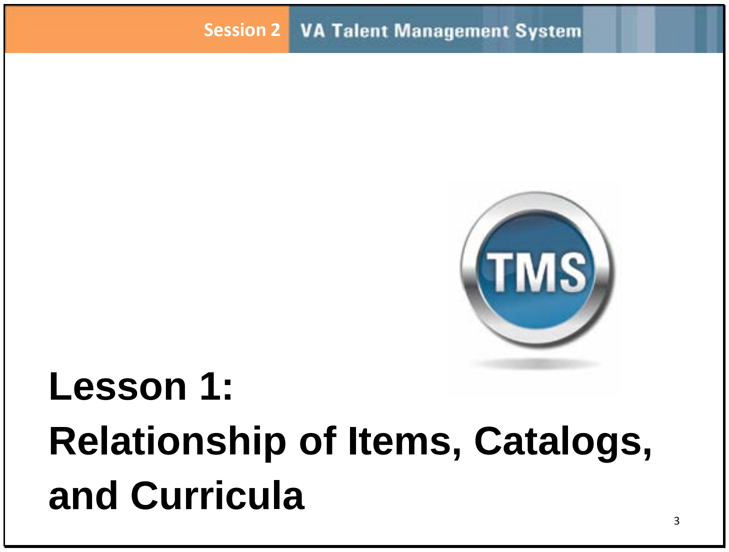
Notes:



Slide 2: Session Objectives

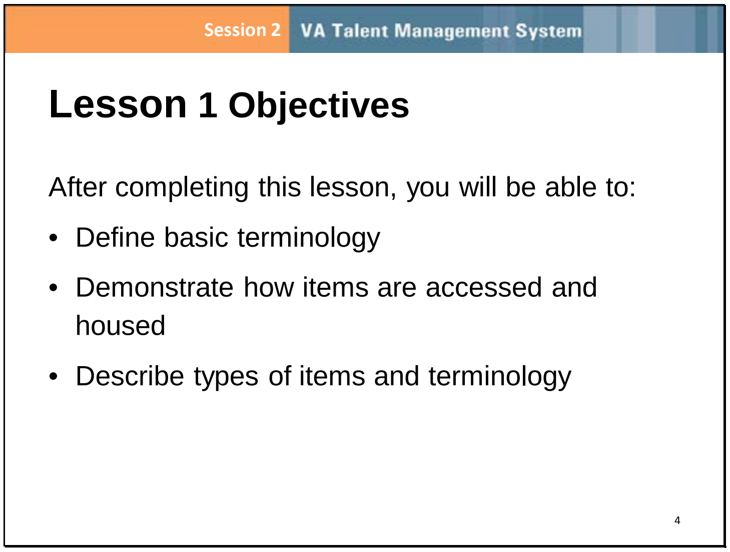
Notes:

1.2 *Lesson 1: Relationship of Items, Catalogs, and Curricula*



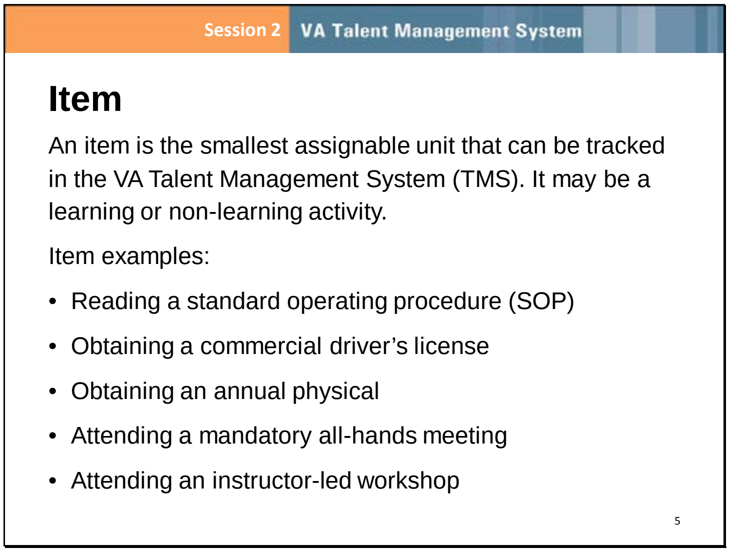
Slide 3: Lesson 1: Relationship of Items, Catalogs, and Curricula

Notes:



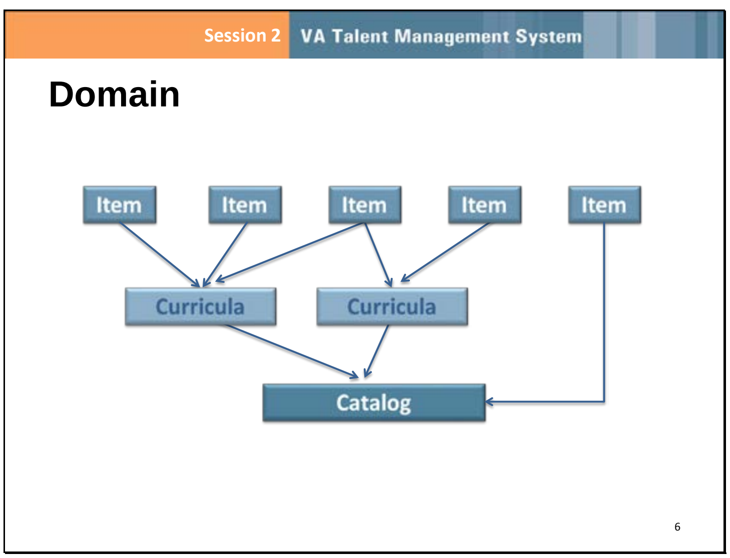
Slide 4: Lesson 1 Objectives

Notes:



Slide 5: Item

Notes:



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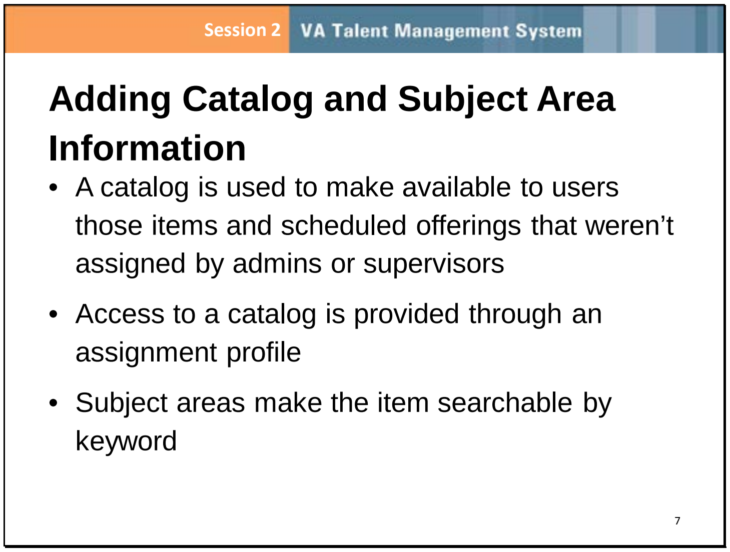
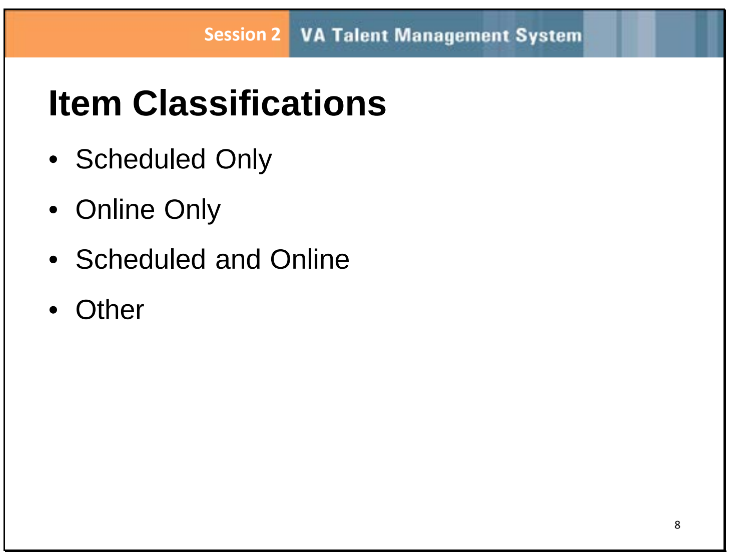


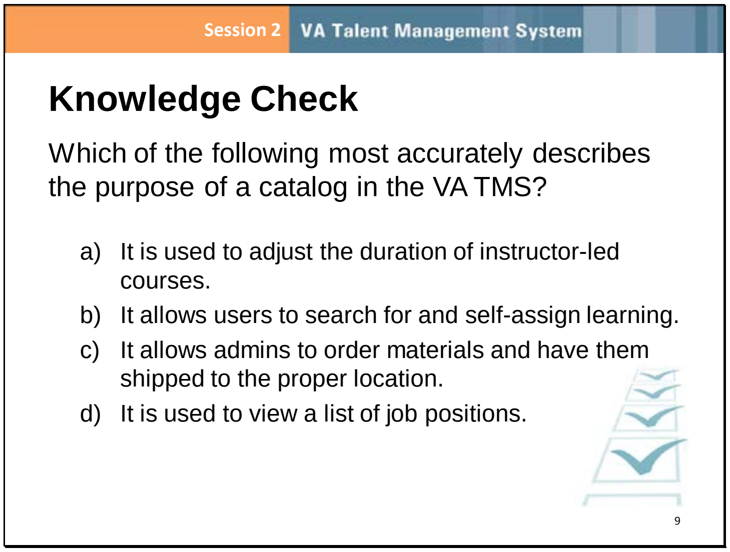
Notes:

Slide 7: Adding Catalog and Subject Area Information



Notes:

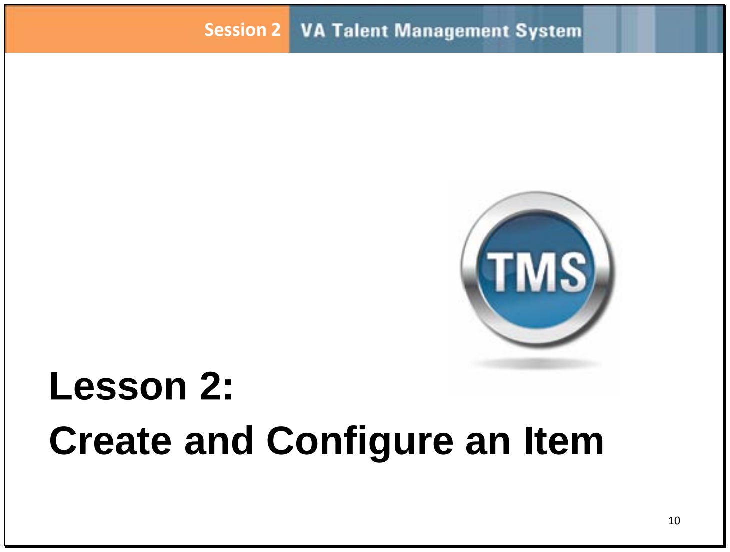
Slide 8: Item Classifications



Slide 9: Knowledge Check

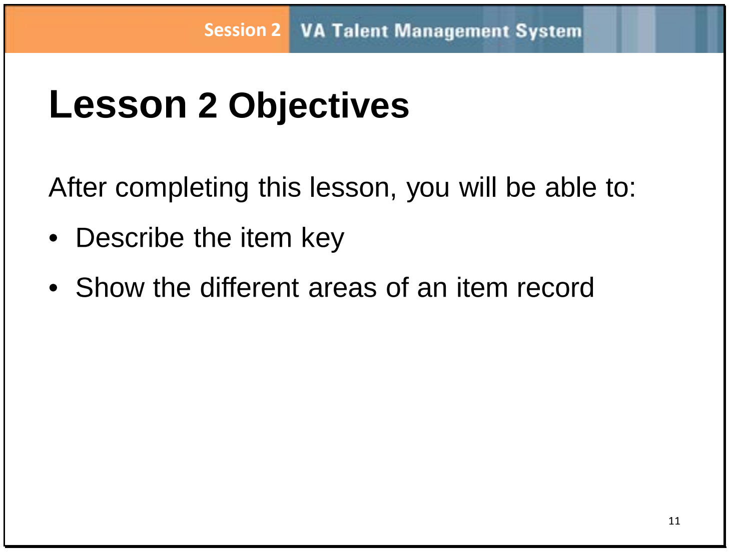
Notes:

1.3 *Lesson 2: Create and Configure an Item*



Notes:

Slide 10: Lesson 2: Create and Configure an Item



Notes:

Slide 11: Lesson 2 Objectives

Session 2 VA Talent Management System

Adding an Item

- When creating a new item, use the Add New Learning Item wizard to enter key data
- When you complete the creation process and submit the data, the entered information displays in the item record

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Slide 12: Adding an Item

Session 2 VA Talent Management System

Demonstration: Creating an Item

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Slide 13: Demonstration: Creating an Item

Demonstration: Creating an Instructor-Led Item

Adding a new item:

1. Navigate to **Learning > Items**.
2. Select **Add New**.

   NOTE: You can also enter **Add Item** into the **Search** field below the button bar and select **Go**.
3. Select to select the item type, **Scheduled Only**. The plus sign changes to a checkmark.
4. Select **OK**.
5. Select an item type from the drop-down menu.
6. Enter the item title.
7. Enter a description for the item.
8. Select a domain for the item.
9. Select on the plus sign symbol next to Additional Options to perform the following tasks.
10. Update the Revision Date, Time and Number, if necessary.
11. Uncheck the **Approval required to self-register** checkbox (if it is currently checked).
12. If there is an entry in the **Approval Process** field, remove it. (If there is a drop-down menu, scroll to the very top of the list and select the blank entry.)
13. Enter the number of hours into contact hours, credit hours, and or CPEs. (You may need to scroll down using the inner window's scrollbar on the right.)
14. In the **Schedule Template** section, select **2** from the **Number of days** drop-down menu.
15. Enter **8** in the **Hours per day** field (if not already defaulted).
16. Select **Save & Exit**. The classification of the item should read "Instructor-Led."

Catalogs allow users to find items. Users will see only the items in catalogs they have been granted access to through their assignment profiles. Users may have access to more than one catalog, where they will see a list of available items. The same item may reside in multiple catalogs.

Depending on the User Role and/or Employee Type selected through Profile Maintenance, individuals will have access to different types of catalogs.

The Internal User Role will receive the Internal Catalog. Those who have an External User Role will see the External Catalog, and those with a Record Only User Role will not see any catalogs.

Catalogs limit access. If you do not include an item in a particular catalog, users with those roles will not be able to see it. A user may self-assign an item or self-register for a scheduled offering of an item if the item resides in a catalog.

Show what a user would find while searching for an item in his or her available catalog.

Notice that the **Action** column allows the user to add to his or her To-Do List and/or go to the content.

The **Catalogs** tab shows users the learning events for which they may register. An admin can flag an item in a catalog as new, featured, or revised until a given date.

You can edit an item's catalog in the following ways:

- **Remove:** The catalogs you want to remove
- **Flag:** Information that appears with items in their catalogs and on the users' **Home** pages. Select an option: New, Revised, or Featured from the **Flag** field drop-down menu
- **Until:** How long you want the flag to appear in the catalog or on users' **Home** pages. You can use the **Calendar** icon by the field to select a date for the flag to disappear
- **Reason:** The reason for the end date of the flag
- **Expires:** A future date when the item will cease to be in the catalog. You might use this for items of a limited nature, such as a conference or seminar. The date you enter in this field will be the last date the item will appear in the catalog. The item itself does not go away; it is just no longer listed in the catalog

Once you have completed the edits for all the selected catalogs, select **Apply Changes**. Your edits will appear on the next page for review.

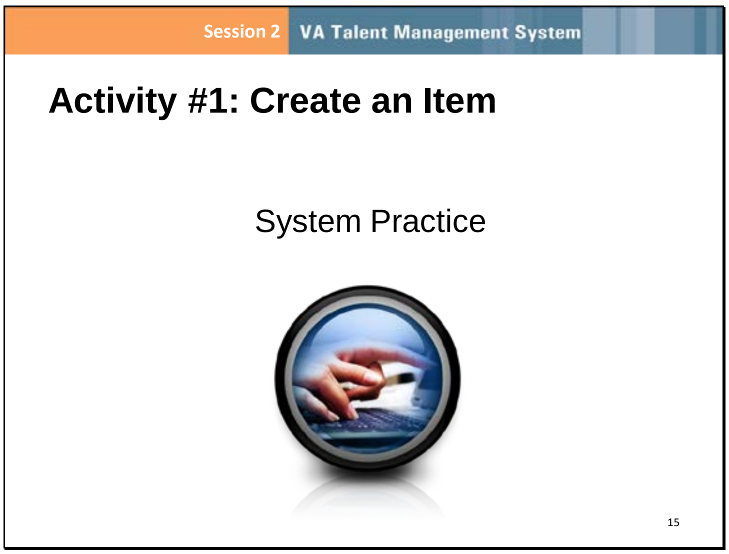
Subject Areas tab:

- Users have the ability to browse catalogs by subject area. If an item has a subject area and is available to a user through the catalog, the subject areas display on the **Browse Catalog** page. The selected subject areas determine where in catalogs the items will appear.
- To view an item's subject areas, select its **Subject Areas** tab.
- Notice that after you create an item, you can apply new changes and revise the revision date and number for the item. You can also delete an item.

  NOTE: You should rarely revise an item. Revising an item will cause it to be immediately reassigned to users who have requirements for the item.

Slide 14: System Login

Notes:



Slide 15: Activity #1: Create an Item

Notes:

Activity #1: Create an Item

Scenario: Your area is going to offer two new courses for new hires and you have been asked to create the two new items in the VA TMS. The two items are New Hire Orientation and IT Policies. Use the information below for both items.

1. Place the items in TEST domain.
2. The courses are Instructor Led, 4 hrs. in length, and 4 credit hours.
3. Use your initials in ID, title, and description.
4. Place the items in the TEST-INTERNAL Catalog.
5. Place the New Hire item in the HR and Staff Development subject area.
6. Place the IT Policies item in the Information Technology subject area.
7. Assignment type ID: Required.

Edit an item:

Using the item created previously, make the following changes:

1. Enter the prep time (in hours).
2. Enter the minimum registration.
3. Enter the maximum registration.
4. Select the **Self-Registration** checkbox.
5. Select **Save**.

In the Segment tab:

1. Enter a description for segment 1 in the **Segment** field.
2. Change the duration.
3. Select a location type from the drop-down menu.
4. Select **Save**.
5. Add another segment for the same day.

   NOTE: Change the day in the **Day** field. If you add another segment to the same day, enter **1** in the **Offset** field. This causes a 1-hour gap between segments. This can be useful to account for lunch or an extended break.

Add a catalog:

1. Using the item created previously, select the **Catalogs** tab.
2. Select the **add one or more from list** link.

3. Enter search criteria to search for the desired catalog in which to add the item.
4. Select **Search**.
5. Select the **Add** checkbox next to all catalogs in which to add the item.

   NOTE: The **Add Schedules** checkbox should be checked if you also want to add all existing scheduled offerings to this catalog.

6. Select **Add**.
7. Verify that all selected catalogs are displayed by selecting the **Catalogs** tab.
8. Select the **Flag** drop-down menu.
9. Select one of the display options (New, Revised, Featured).
10. Select the **Until select date** icon.
11. Select the desired date to display the flag.
12. In the **Reason** field, enter why this item is flagged (this can be seen by the user).
13. Enter an expiration date (if desired).

    NOTE: This date determines when the item is to be automatically removed from the catalog. It is removed by the purged expired catalog Assignment Profile Manager (APM).

14. Select **Apply Changes**

Add Subject Areas:

15. Using the item created previously, select the **Subject Areas** tab.
16. Select the **add one or more from list** link.
17. Enter search criteria for the desired subject areas to add the item.
18. Select **Search**.
19. Locate the appropriate subject area(s) in which to categorize the item.
20. Select the **Add** checkbox next to all subject areas applicable to the item.
21. Select **Add**.

Session 2 VA Talent Management System

Item Key

An item key is a unique identifier that consists of the item type, item ID, and the revision date and time.

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Slide 16:Item Key

Notes:

Session 2 VA Talent Management System

Item Key

Item Type	Item ID	Revision Date and Time
A globally defined reference that helps categorize items. When you create an item, you must choose from a predetermined reference list.	A unique identifier for each item within the TMS. It is auto-generated in the VA TMS system when an item is created.	Defaults to current date and time and version 1. The admin can override the data in these fields if needed.

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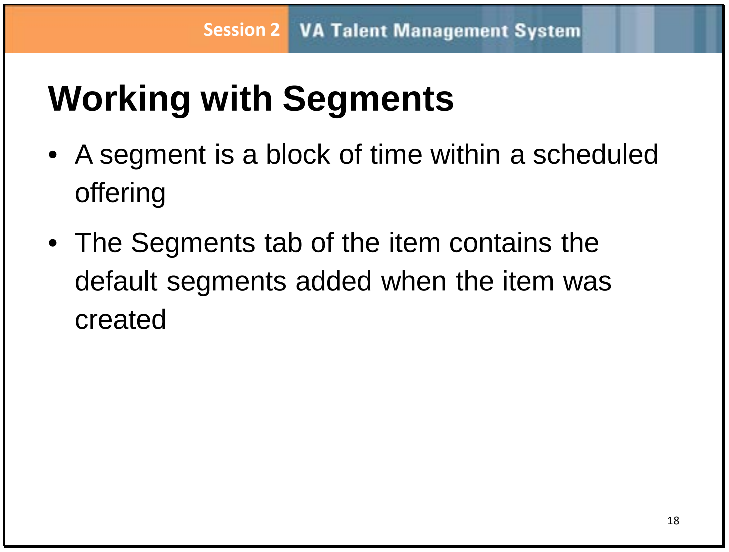
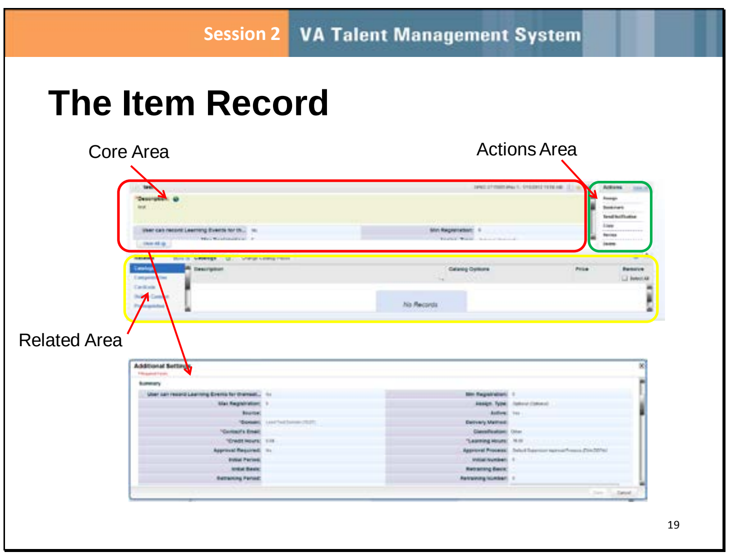
Slide 17: Item Key

Notes:



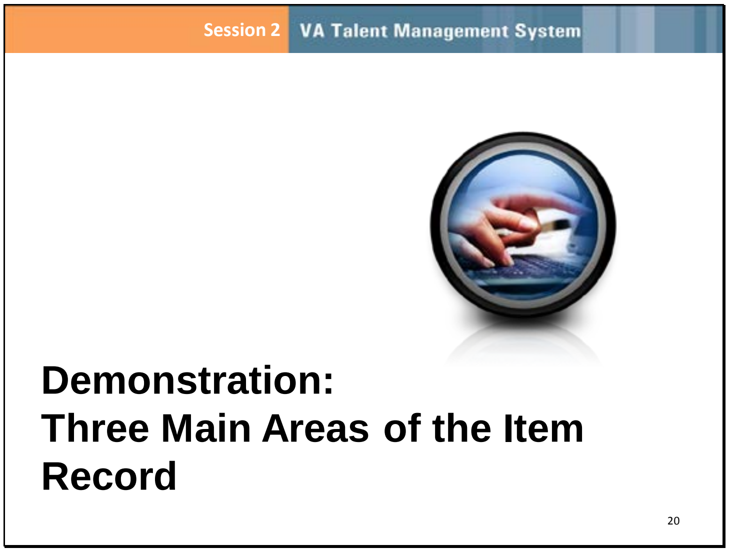
Slide 18: Working with Segments

Notes:



Slide 19: The Item Record

Notes:



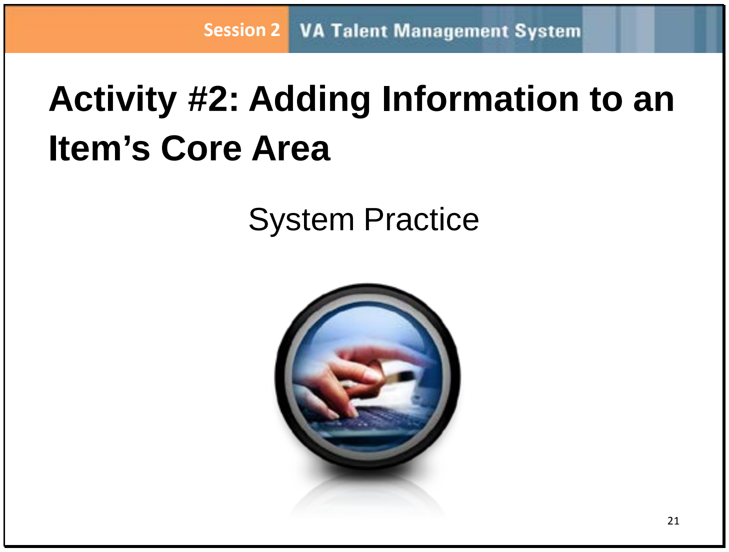
Slide 20: Demonstration: Three Main Areas of the Item Record

Notes:

Demonstration: Three Main Areas of the Item Record

Log in to the VA TMS to show the three main areas:

1. **Core Area:** The **Core** area contains the basic information of the item record, including the item title, item key, description, and classification. To edit any field in this area, select in a displayed field and enter text or select a reference value (depending on the field type). Once expanded, the screen displays the following sections where updates can be made:
   - Title
   - Description
   - Summary
   - Extended Summary
   - Design
   - Process Control
2. **Related Area:** The **Related** area of the item record contains additional information regarding the item. Select the **Related** tab on the left (i.e., Segments) to display the details on the right. Select **More** to see additional **Related** tabs.
3. **Actions Area:** The **Actions** area of the item record contains links to additional actions that can be taken on the item record, including:
   - Assign (initiates the **User Needs Management** tool to enable you to batch assign items and curricula to one or more users)
   - Schedule (creates a scheduled offering of the item)
   - Send Notification (initiates the ad hoc notification wizard)
   - Copy (opens the **Copy Item** window that allows you to copy the item)
   - Revise (initiates the revision wizard)
   - Delete (deletes the item)



Slide 21: Activity #2: Adding Information to an Item’s Core Area

Notes:

Activity #2: Adding Information to an Item's Core Area

Adding information to an item's Core area:

1. Using the item created previously, select the **Assign Type** field and select **Required (REQ)** from the drop-down menu.
2. Select **Save**.

In the Summary section:

1. Select the **Source** field and select **Internal (INT)** from the menu.
2. Select the **Enable User Requests** field and select **Yes** (if not already selected by default).

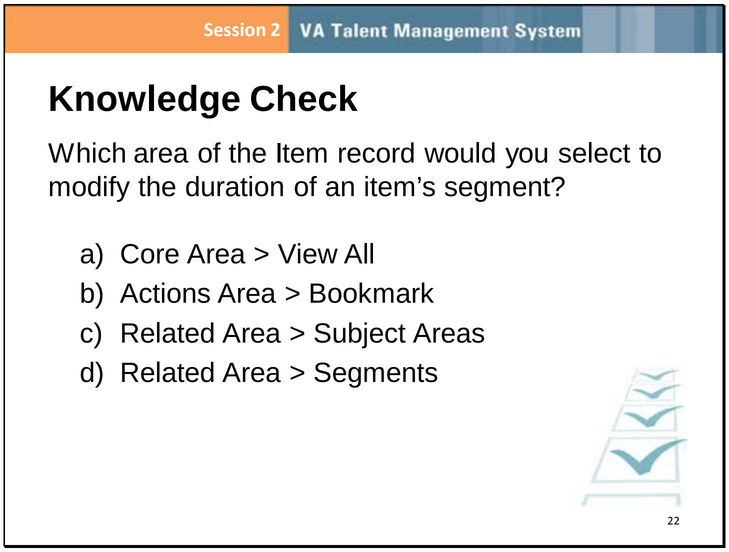
In the Extended Summary section:

1. Select the **Max Registration** field and enter a default number of maximum users that should be enrolled when the item gets scheduled.
2. Select the **Min Registration** field and enter a default number of minimum users that should be enrolled when the item gets scheduled.
3. Select the **Self-Registration** field and select **Yes** from the drop-down menu (if not already selected by default).

   NOTE: This will give users who are assigned this item 30 days to complete it from the assignment date.

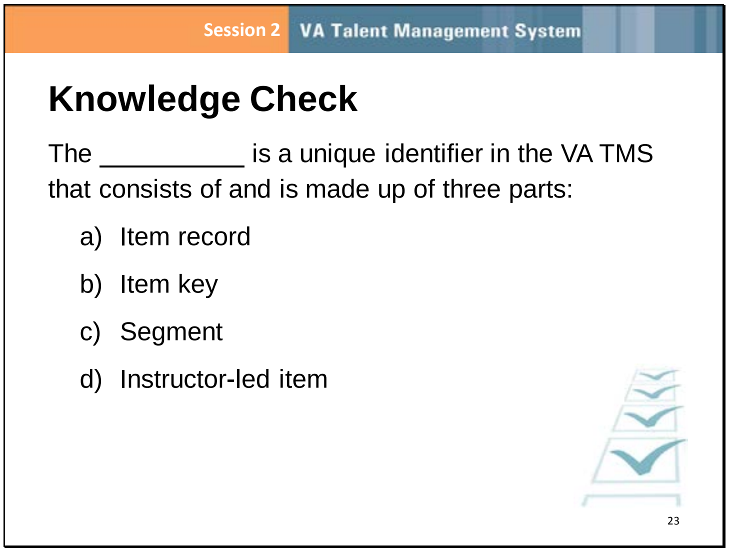
In the Process Control section:

1. Select the **Supervisors can record Learning Event** field and select **No** (if not already selected by default).
2. Select the **Users can record Learning Event** field and select **No** (if not already selected by default).
3. Select **Save**.



Slide 22: Knowledge Check

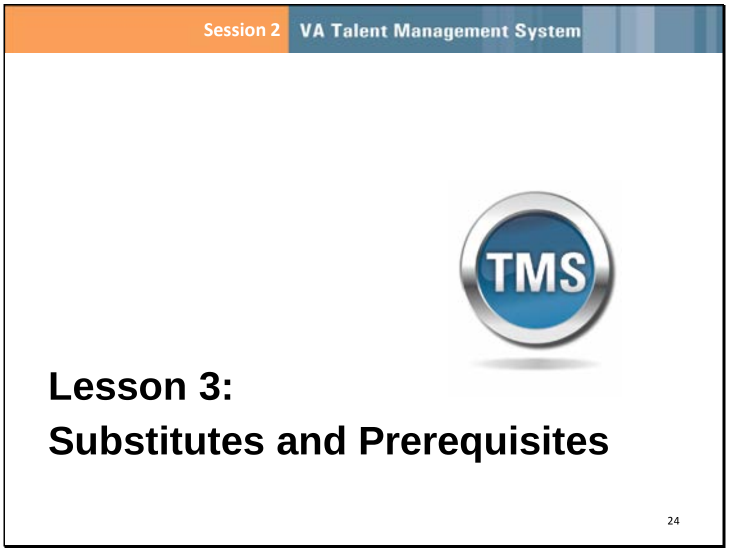
Notes:



Slide 23: Knowledge Check

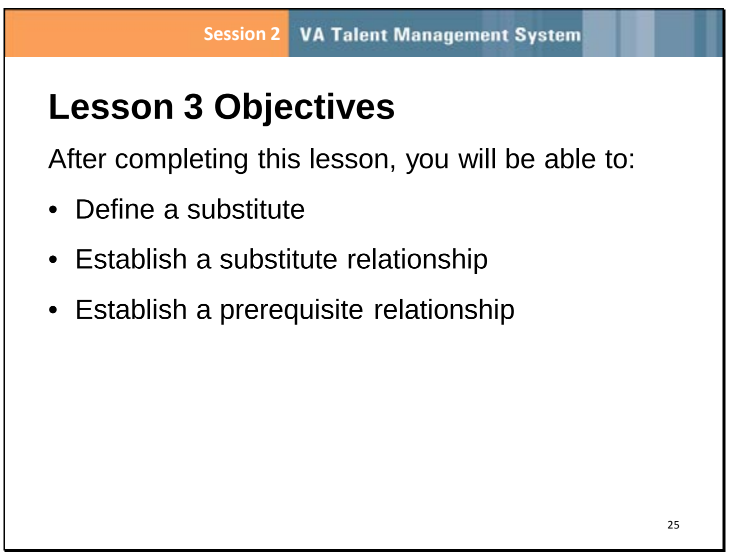
Notes:

1.4 *Lesson 3: Substitutes and Prerequisites*



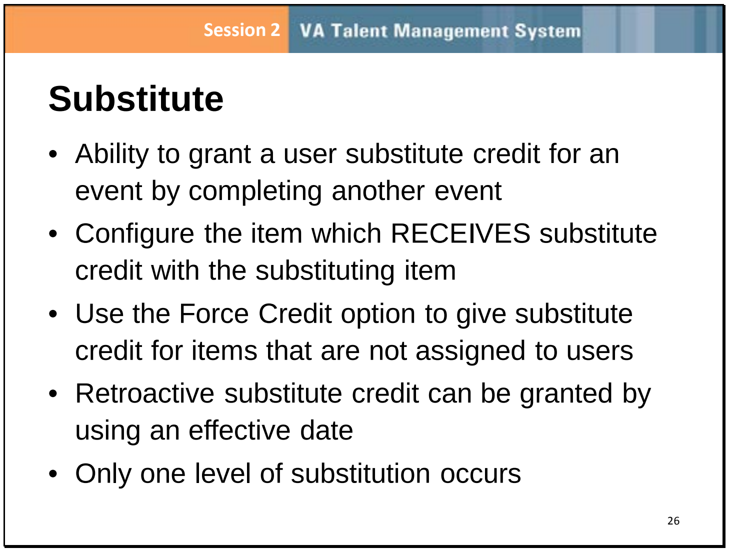
Slide 24: Lesson 3: Substitutes and Prerequisites

Notes:



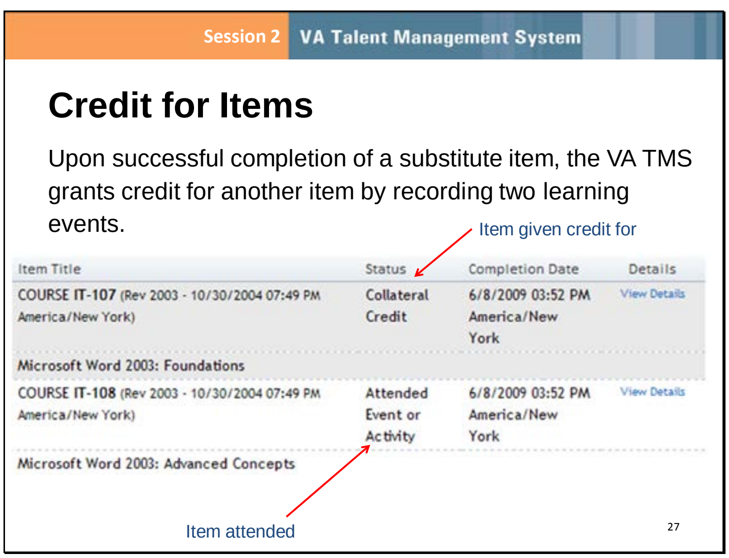
Slide 25: Lesson 3 Objectives

Notes:



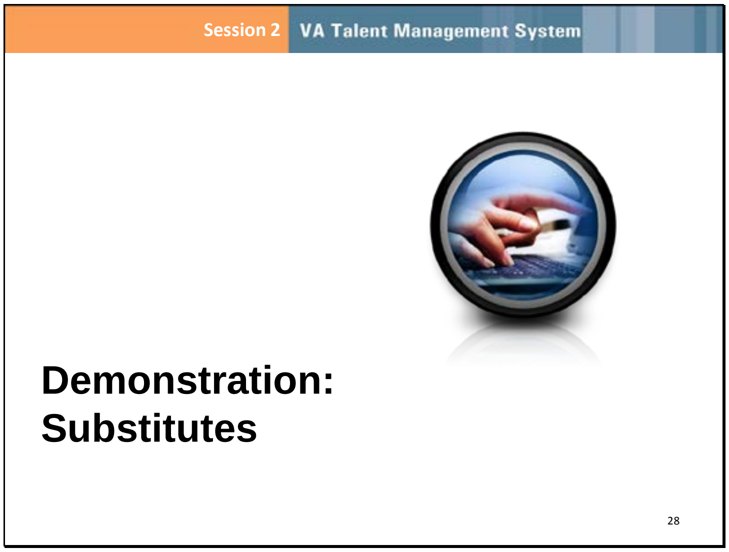
Slide 26: Substitute

Notes:



Slide 27: Credit for Items

Notes:



Slide 28: Demonstration: Substitutes

Notes:

Demonstration: Substitutes

To establish a substitute relationship:

1. Search for the item that will be recorded into a user's learning history (completed work) with a status of substitute credit.
2. Select the **item ID** link.
3. Select the **Substitutes** tab from the **Related** area.
4. Select **Add New Substitutes**.
5. Enter criteria to search for the item that will grant substitute credit.
6. Select **Search**.
7. Select **(completion) status substitute credit** from the **Status** drop-down menu.
   NOTE: This is the completion status for the item that will receive substitute credit.
8. Check the **Force Credit** checkbox.
   NOTE: If **Force Credit** is not checked, then users must have the item receiving substitute credit on their To-Do List in order to record the substitute learning event. When **Force Credit** is checked, users always receive substitute credit for the item regardless of whether it is assigned to their To-Do List.
9. If you would like to apply retroactive substitute credit, enter an effective date.
10. Check the **Add** checkbox.
11. Select **Add**.
12. Verify the selected item is displayed with the correct settings.
13. Record a learning event for the item that grants substitute credit.
14. Check the user's Completed Work (Learning History).

The Job Aid: Manage Substitutes and Prerequisites is available in the VA TMS.

Session 2 VA Talent Management System

Activity #3: Create a Substitute Relationship

System Practice

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Slide 29: Activity #3: Create a Substitute Relationship

Notes:

Activity #3: Create a Substitute Relationship

Scenario: The VA has recently added two courses, Motorcycle Safety and Motorcycle Safety Advanced, for their security officers. If an officer qualifies for the Motorcycle Safety Advanced Course, he or she should get credit for the basic Motorcycle Safety Course.

Create a substitute relationship for Motorcycle Safety, so if an officer takes the advanced course, he or she will get credit for the basic course.

1. Navigate to **Learning > Items**.
2. Search for the Motorcycle Safety Course (Item Title, contains, motorcycle safety).
3. Select **Copy** from the **Actions** menu.
4. Select **Add the new item to the catalog** and select **Copy**.
5. Add your initials to the title of the item and select **Save**.
6. Select the **Substitutes** option from the **Related** area.
7. Select the **add** button.
8. Enter search criteria to search for Motorcycle Safety Advanced.
9. Select **search**.
10. Select the appropriate status from the **Status** drop-down menu (Complete).
11. Check the **Force Credit** checkbox (to give credit for the item even if it is not on the user's To-Do List).
12. Add effective date if retroactive credit is required.
13. Select the **Add** checkbox.
14. Select **Add**.
15. Verify the selected items displays with correct settings in the **Related** area of the item record.

Session 2 VA Talent Management System

Prerequisites

- Prerequisites are identified on the item record's Prerequisite tab in the Related area.
- Depending on settings, users who do not meet the prerequisites are prevented from registering for the scheduled offering if:
  - The prerequisites are not listed in the user's Learning History
  - The user is not registered into scheduled offerings of the prerequisites that have an end date prior to the start date of the scheduled offering

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Slide 30: Prerequisites

Notes:

Session 2 VA Talent Management System

Demonstration: Prerequisites

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Slide 31: Demonstration: Prerequisites

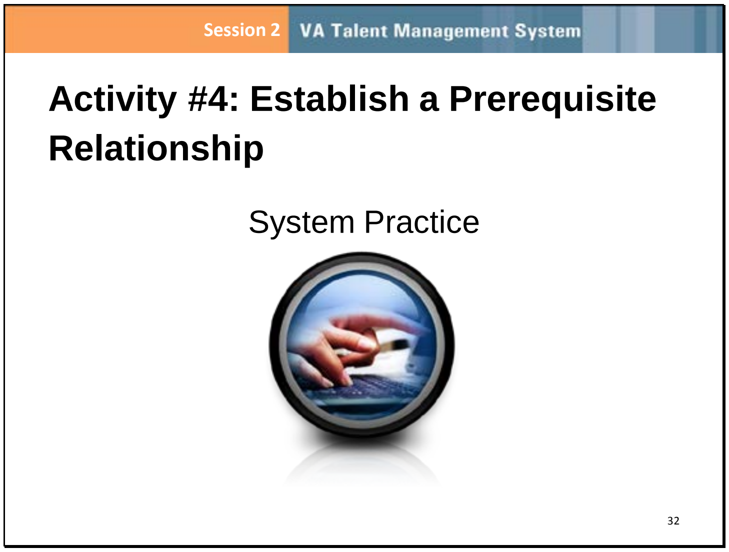
Notes:

Demonstration: Prerequisites

To establish a prerequisite relationship:

1. Add two new items.
2. Select the **Prerequisites** tab from the **Related** area of one of the items.
3. Select **Add New Prerequisites**.
4. Enter criteria to search for the other item created in step 1. This will be the prerequisite item.
5. Select **Search**.
6. Check the **Add** checkbox.
7. Select **Add**.
8. Verify the selected item is displayed.

The Job Aid: Manage Substitutes and Prerequisites is available in the VA TMS.



Slide 32: Establish a Prerequisite Relationship

Notes:

Activity #4: Establish a Prerequisite Relationship

Scenario: You have decided to make the basic Motorcycle Safety Course a prerequisite for the Advanced Motorcycle Safety Course.

To create a prerequisite relationship in the VA TMS:

1. Navigate to **Learning > Items**.
2. Search for and select **Advanced Motorcycle Safety Course** or select from Recents.
3. Select **Copy** from the **Actions** area of the item record.
4. Add your initials to the title of the copied item and select **Save**.
5. Go to **Prerequisites** in the **Related** area of the item record.
6. Select on the **Add** icon. Search for your copy of Motorcycle Safety Course.
7. Check the **Add** box.
8. Verify that the course has been added as a prerequisite.

Session 2 VA Talent Management System

Knowledge Check

Which of the following identifies alternatives for completion of an item record?

a) Prerequisite
b) Summary
c) Notifications
d) Substitutes
e) Surveys

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Slide 33: Knowledge Check

Notes:

Session 2 VA Talent Management System

Knowledge Check

Users who do not meet prerequisites are prevented from registering for a scheduled offering. Which of the following indicates that a prerequisite was NOT met? (Select all that apply.)

a) The prerequisite is not listed in the user's completed work.
b) The end date of the scheduled offering is after the end date of its prerequisite.
c) The prerequisite is listed in the user's Learning History.
d) The start date of the scheduled offering is before the end date of its prerequisite.

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Slide 34: Knowledge Check

Notes:

Session 2 VA Talent Management System

Session 2 Summary

- Explain the relationships among items, catalogs, and curricula
- Describe the different types of items and curricula
- Create substitute and prerequisite relationships

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Notes:

Slide 35: Session 2 Summary

Session 2 VA Talent Management System

Session 3 Preview

- Title: Create and Configure Items and Curricula (Part 2 of 2)
- Lessons:
  4. Relationship of Items, Catalog, and Curricula
  5. Create and Configure an Item

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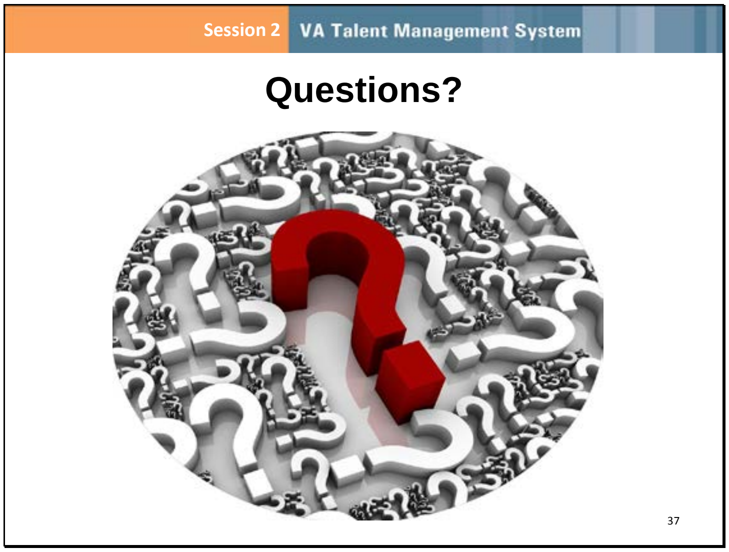
Notes:

Slide 36: Session 3 Preview



Slide 37: Questions

Notes: